

The Journal

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Enhancement Surveys



Members at the November User Group meeting

Exploiting
the
database

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your
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User Group Enhancement Surveys

Wouldn't it be wonderful if your customers got together and—at their own expense—conducted a survey which told you what you had to do to keep them happy?

by **Tim Cullis, INFAR**

THE DREAM User Group is chartered with providing a common interface to SquareSum, and now CODA. The most visible aspect of this is the annual enhancement survey, gathering ideas from existing DREAM users as to how the package could be further refined.

In the four-year period 1999-2002, SquareSum issued two or more product releases per year and had an impeccable track record for implementing enhancements suggested and voted upon by User Group members.

When the news of the CODA takeover was announced, the overwhelming concern amongst users was whether CODA would continue to develop and support DREAM. Since then, however, CODA has published a road map of ongoing product development and we anticipate CODA will continue to value the important customer feedback in the enhancement surveys and to incorporate the best ideas in future releases.

At the risk of being accused of stating the blindingly obvious, I

should point out at this stage that to get the new features you need to upgrade to the latest version of DREAM. You may not have the resources to upgrade each time there's a new release, but keeping

already available in a later version of the software than the submitter is using. And alternative ways of achieving the result might also be suggested. Such items are only removed from the list after discussion with the original submitter.

Once CODA comments have been incorporated into the enhancement list, it is then circulated to all members together with a voting form.

Tracking the response

Each organisation can 'spend' a total of 100 votes, distributed amongst the suggestions as they wish. In smaller organisations the voting form might be completed by a single individual. We are aware, too, that in many organisations the voting is discussed internally at length and sometimes the ballot voting form requires senior management approval.

It is always a surprise that more member organisations don't return ballot forms—this sends the wrong message to CODA. Even stranger is when an organisation fails to

It would be helpful if more members voted in the ballot

on older versions means you aren't able to take advantage of the many new features.

As you can see from the table below, as at November, 81 per cent of installed sites were on one of the (then) two latest releases.

Producing the survey

A great deal of effort goes into the survey and some organisations have a formal process of bringing together and discussing ideas to submit. Once the suggestions are received by the User Group they are collated into similar topics so that any duplication or overlapping can be highlighted; clarification is sometimes sought where suggestions aren't straightforward. The preliminary consolidated list is then submitted to CODA for response and comment.

Sometimes it will be pointed out that a similar functionality is

Percentage of user base on particular releases (CODA statistics)

	Oct 02	Sep 03	Nov 03
v3.0	0	46	62
v2.12	41	30	19
v2.11	13	6	5
v2.10	17	10	8
earlier	29	8	6

DREAM release history

1999	v2.6, v2.7
2000	v2.8, v2.9, v2.10
2001	v2.11, v2.12
2002	v2.13, v3.0
2003 (just)	v3.1
2004 (planned)	v3.1e, v3.2

vote despite having taken the time to submit enhancements! During last autumn's ballot the User Group office did a lot of chasing by email and telephone to increase the percentage response.

The votes on returned ballot papers are entered into a spreadsheet so that for each enhancement suggestion we can track both the total number of votes cast, plus the number of organisations that voted for it.

The results are then passed to CODA for their response at the next User Group meeting.

Impact on development

The challenge is to balance the often-conflicting demands placed upon development. With our User Group hat on, we obviously want the top enhancement suggestions to be implemented, but we have to recognise that enhancement suggestions are also generated by

- major accounts (e.g. v2.13),
- CODA's support and consultancy (who see additional ways of addressing user needs),
- marketing and sales (who want DREAM to remain competitive), and also
- development (who need to move to the latest Microsoft technology).

Prior to the v3.0 release in October 2002, SquareSum had already pencilled in two releases for 2003—v3.1 due in March would bring worthwhile improvements in functionality for those using procurement, whilst 3.2 would follow in autumn 2003. The tight schedule for v3.1 meant that the 2002 user enhancement ballot (which at that time was still in progress) could not be considered, and user enhancements would have to be included in the autumn release.

For various reasons—thought mainly to do with procurement being more complex than originally

Non-procurement enhancements in v3.1

- Transaction types with better budgets
- Enhanced account search facility
- Depreciation enhancements for year-end
- Cash VAT processing improvements for multiple debtor rows
- More reports available through DREAM automation

2004-05 technical development

- Technical adherence (.NET)
- Architectural maintenance (DBLIB replacement)
- Technical accreditation—Oracle 9i, Windows Server 2003
- Improved integration—web services, API, automation

2004-05 likely functional enhancements

- CODA Datamart integration
- Improving reporting engine
- Credit management (workflow, diary management)
- Improved entities management

envisaged, and taking the opportunity to implement a more flexible way of handling budget records—v3.1 slipped, firstly to mid-year and then to the end of 2003.

v3.1 and v3.2 product plans

The result of the slippage was that not a single enhancement request from the 2002 User Group ballot had been considered by the end of 2003.

And worse was to come, for questioned upon this at the v3.1 launch in September 2003, CODA's Dave Anstey stated that much of the development effort for v3.2 (now scheduled for Q4 2004) would be taken up with technology-type changes, although some resources would be made available for enhancement requests coming from the User Group and elsewhere.

The concern amongst the Council of the DREAM User Group was that this policy might result in many users not upgrading—because they don't see any benefit in doing so—which in turn might lead to a scenario where CODA says there's no point enhancing the product as not enough users have upgraded to the current version.

The User Group put these points to CODA; in the meantime the 2003 enhancement ballot had taken place with a much-increased level of voting from member organisations.

v3.1 'interim'

Those who were at the recent November User Group meeting will know that CODA has now committed to an enhanced v3.1 release (referred to below as v3.1e), scheduled for completion Q1 2004. Subsequently it has been agreed that other requests from the 2002 and 2003 ballots will be scheduled for the v3.2 release.

The current situation with the last two enhancement ballots is shown overleaf. There was considerable discussion during the January Council meeting on the status of the enhancement requests and the following conclusions were passed to CODA.

2002 outstanding requests

222 Post across periods: We accept this is difficult to do and can be currently implemented with XML, so we agreed that we should remove it from the outstanding

Top topics in 2002 enhancement ballot

1	#222	Input to post across multiple periods	use XML
2	#183	Ability to select all items for allocation	
3	#194	Easier import of budgets	
4	#177	Change account secured flag default	
5	#256	Print preview for reports	
6	#174	Access accounts by name	
7	#181	Allow allocation on document currency	v3.0
8	#199	Report actual vs budget at account level	v3.1
9	#182	Automated deallocation of all lines on doc	
10	#219	Show line number on journal	
11	#220	Additional user fields for input	v3.2
12	#184	Flag to show attachment exists	

311 Merge Paylists: This is akin to the need to differentiate between requisitions and orders in purchase ordering, i.e. some organisations use the paylist as a request to pay. As the enhancement was well supported both in votes and organisations we should like to see this considered for v3.2.

291 Budget roll-up: we believe this is covered by v3.1 changes.

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enhancement list, however please keep in mind for any major rewrite.

183 Allocation selection: As this was supported by more than 50 per cent of the respondents, we should like you to consider it for v3.1e interim release.

194 Budget import: The functionality needed is now met by a free third-party utility and we will remove it from the outstanding list.

177 Flag default: Probably the simplest-ever enhancement requested, and we should like you to consider this for v3.1e interim.

256 Print Preview: We accept this is very difficult to do and will remove it from the outstanding enhancements list.

174 Input list sorted by name: This is a worthwhile enhancement that we consider is not difficult to achieve, and we should like you to consider this for v3.1e interim.

219 Line no in import: we feel this is not difficult and should like you to consider this for v3.2.

199 Report budget vs actual: We believe this becomes available as part of v3.1.

2003 outstanding requests

288 Archive: we accept that users needing this functionality could use consultancy, however archiving has been in the top ten requests for several years, and as time goes by it becomes increasingly important to a larger percentage of the installed base.

Top topics in 2003 enhancement ballot

1	#284	Aged analysis drilldown to display details	v3.0
2	#294	Increase field length for descriptions	v3.2
3	#308	Recalc nominal detail totals on re-sort	v3.1e
4	#300	TB on both nominal plus account indices	v3.1e
5	#292	Budgets on nominal analysis report	v3.1e
6	#288	Completely remove archived transactions	
7	#311	Merge individual paylists on to one run	
8	#291	Budget roll-up from account to nominal	v3.1
9	#289	Balance tables by x-account	
10	#296	Bulk selection of documents for hold/dispute	
11	#316	Selection of nominals when running on index	
12	#301	Rename index items	

Tips and Tricks

ARE YOU TIRED of having to click on a whole series of entries to mark them for allocation?

Matthew Fraser Moat of Descartes Consulting/Athletics Weekly was, and suggested enhancement #183, for the ability to *“Select all items for allocation on a nominal detail report, so you can deselect one or two items rather than having to select 50 or more items line by line!”*

Matthew's suggestion came second in total votes cast in the 2002 enhancement ballot, and top in terms of the number of organisations voting on it. The enhancement has yet to be actioned, however it has been suggested to CODA that as the enhancement was supported by

more than 50 per cent of the respondents, it should be considered for v3.1 interim release in early 2004.

In the meantime, here's a suggestion to ease the chore of bulk allocation—click on the first entry, and as usual it goes green. Use the downarrow key to move to the next line, hold down the Ctrl key and press 'enter'. If you keep holding down both Ctrl and Enter, you can mark a large number of entries to be allocated.

With a very large range of entries the window re-display sometimes can't keep up with where you are, but with experience you can roughly judge this.